Presentation to Special Task Force on UW Restructuring and Operational Flexibilities
Feb. 8, 2012
UW-Madison Interim Chancellor David Ward

Services UW System administration provides to UW-Madison

<u>Administrative Services:</u>

Business Services

- System Administration provides UW-Madison with reimbursement of Zero Balance Bank Accounts on a daily basis based on UW-Madison check-writing activities.
- System Administration maintains (via the Division of Information Technology) the Shared Financial System which supports UW-Madison General Ledger and financial accounting and reporting, revenue processing, accounts payable processing, tax (form 1099) reporting, and eReimbursement processing.
- Delegation to UW-Madison for expenditures flows from DOA through System Administration to UW-Madison.
- System Administration maintains the ledger for and invests all UW-Madison Trust Funds under the control of the Board of Regents.
- System Administration maintains the ledger for other large trusts established for the benefit of UW-Madison, such as the Vilas and Hilldale Trusts.
- System Administration processes payments on behalf of UW-Madison for debt service and for master equipment lease agreements.
- System Administration contracts with a vendor to provide combined IRS 1098T tuition and 1098E student loan interest reporting for all UW System campuses under the UW System federal tax ID.
- System Administration and other UW institutions bid and award contracts that are usable by UW-Madison.
- Property and Liability Insurance – We report property values and liability information to System Administration to be pooled with the other System-wide info, which is then sent to DOA. DOA uses these numbers to secure excess coverage, the cost of which is added to their department costs and distributed to all state agencies – System Administration then allocates the charge to all campuses.
- System Administration procures a number of System-wide insurance policies including Camps & Clinics, Special Events, Boiler and Machinery, Crime, Cheerleader policy, Study Abroad, and others. We are invoiced for our share of the premium.
- System Administration does background checks on UW-Madison employees approved to access DOT driver's license records and DOA's Fleet Anywhere system.
- System Administration coordinates and responds to the report from the Legislative Audit Bureau's annual audit of the UW System financial statements (as part of the State's Consolidated Annual Financial Report – CAFR Audit) and the federally mandated A-133 federal funds audit.

Budget Office
- UW System is responsible for preparation and submission of all biennial budget materials to the Department of Administration. UW System "owns" and maintains the underlying information technology system used to prepare annual budgets. UW-Madison has developed many on-line reporting tools used in annual budget preparation. (The on-line tools are distinct from the underlying legacy budget system.) The tools are hosted on a UW-Madison server and are used by all campuses.
- UW System is responsible for all official financial reporting for UW-Madison. In addition, UW System is responsible for data submission for various national benchmarking surveys, such as IPEDS (Integrated Postsecondary Education Data System) and the NSF R&D Survey.
- UW System maintains the building inventory, valuation and related depreciation for all campuses. This data is critical to the calculation of UW-Madison's indirect cost rate.

Facilities, Planning and Management
- UW System staff attorneys provide services that are not duplicated within UW-Madison legal office. They provide legal expertise for use agreements, land use agreements with federal government and ARS properties; ground leases, easements, deeds, condominium documents, development agreements and condemnation.
- UW System Capital Planning and Budget staff are the agency representative for the enumeration of capital projects and for design and construction approvals from both the Board of Regents and State Building Commission. UW-Madison staff prepare all the documents: the biennial major project requests, project budget estimates, RFPs for architectural and engineering consultants, and monthly agency requests for authority to construct. UW-Madison staff also prepare the biennial lists of maintenance projects for submittal to UW System.
- UW System engineering staff have assisted with identification of issues and development of scope for utility projects.
- UW System receives all the biennial capital budget requests prepared by the campuses. Requests with a GPR funding component are reviewed and ranked by System staff and prioritized into one system-wide list. Non-GPR funded project requests are reviewed.
- As the agency representative, UW System is the official voice for the campuses in front of the Regents and State Building Commission.
- UW-Madison staff (Capital Planning & Development, Campus Planning and Landscape Architecture) prepare the six-year development plans and biennial campus development plan for UW System staff to review and transmit to DOA.
- UW System staff serves as the environmental protection officer/agency representative for all UW campuses coordinating and approving the overall process of developing Environmental Impact Statements and Environmental Impact Assessments for all capital improvement projects.
- UW System staff serves as the designated Historic Preservation officer and agency representative on all matters related to historic preservation, historic properties and sites including National Register of Historic Places, archaeological sites and potentially historic facilities.
- UW System gathers input from campuses and works with DOA on the development of the statewide hazardous waste contract. UW System staff also serve as a resource on legislation/rule changes related to EHS issues and may provide advice and/or templates for environmental reports (stormwater management, spill prevention).

Information Technology
- UW System provides Common Systems, the IT systems in support of all the campuses, allowing the System to pool resources and deliver services at lower costs than each campus could deliver on their own.

Academic/Student Services:

Libraries
- UW System provides a library consultant position for all of the UW System libraries. Although currently vacant, the position provides leadership in areas including the biennial budget process, library technology, UW System budget, strategic communication and coordination of library services across UW System libraries.

Dean of Students
- UW System collaborates with UW-Madison and other campuses on sexual assault reporting. System provides aggregate data from all campuses after each campus submits information annually.

Academic Planning and Analysis, and Institutional Research
- UW System prepares annual mandated Integrated Postsecondary Education Data System (IPEDS) reports to the U.S. Department of Education (National Center for Education Statistics.)
- UW System prepares and distributes sets of standard reports related to student admissions, enrollment, transfer and degrees that are useful references.
- UW System oversees and coordinates the program approval and program review processes that stem from associated Regent policies.
- UW System provides grant/funding programs that support teaching and learning and diversity efforts.
- UW System develops and supports the System-wide Transfer Information System.

Services UW System provides to other institutions but that UW-Madison provides for itself

Administrative Services:

Business Services
- UW System administration provides workers compensation and property and liability claim processing services for other UW institutions. UW-Madison provides these services for itself.
- UW-Madison provides its own procurement services.
- UW-Madison provides internal audit services.

Facilities, Planning and Management
- FP&M has architects, engineers, landscape architects, planners and project managers on staff. Staff are responsible for the design, coordination and oversight for remodeling and facility/landscape improvement projects constructed by UW-Madison Physical Plant.
- FP&M staff represents UW-Madison at monthly A/E selections for All-Agency projects and manages the contracting process for Small Projects under $185,000.

Other
- UW-Madison's Office of Administrative Legal Services provides the campus with legal advice, guidance and representation.

Academic/Student Services:

Libraries
- UW-Madison Libraries provide their own technology and staff to support library operations.

Academic Planning and Analysis, and Institutional Research
- UW-Madison conducts peer analyses on a number of indicators. Because the comprehensive campuses often are each other's peers, UW System reports serve as peer data reports. These provide useful perspective for UW-Madison but do not serve the university's needs for peer data.

Services UW-Madison provides to other UW institutions in conjunction with UW System administration

Administrative Services

Human Resources
- The UW Service Center at UW-Madison provides payroll and benefits services to all UW campuses (about 70,000 employees, annual payroll about $2B).
- The Office of Human Resources International Faculty and Staff Services unit provides periodic employment immigration training sessions to other campuses at the request of the UW System General Counsel. UW-Madison also provides immigration consultation on a case-by-case basis to other campuses.
- UW-Madison Employee Assistance Office (EAO), located within OHR, provides UWS Administration employees and supervisors/managers/administrators the same range of employee assistance services it provides to the UW-Madison campus:

Business Services
- UW-Madison bids and awards contracts that are usable by other UW institutions.
- UW-Madison represents UW System and other campuses on some DOA procurement development teams.
- MDS contracts for prime vendors in major commodity groups. These contracts are used by all UW institutions via the e-Commerce computer system at MDS. The e-Commerce platform provides operational efficiencies (ordering, fulfillment, invoice audit, contract compliance) to UW institutions. Billings back to the UW institutions occur via inter-unit journals in the Shared Financial System which are processed by System Administration based on data from MDS.
- MDS delivers goods ordered by System Administration, UW Extension, UW Colleges Administration, as well as other state agencies and municipalities via the prime vendor relationships to offices in the Madison area.
- SWAP accepts items for resale or disposal from System Administration, UW Extension and UW Colleges Administration in the Madison area.
- SWAP lists goods for resale from all UW institutions on its surplus auction site and uses the Shared Financial System to credit those institutions for a part of the sale proceeds.
- UW-Madison bids and awards contracts that are usable by other UW institutions.

Budget Office
- UW-Madison prepares indirect cost rate calculations for UW-Milwaukee and UW-Extension.
- UW-Madison calculates extramural fringe benefit rates for UW-Milwaukee and UW-Extension. The three campuses (including UW-Madison) currently operate in a shared fringe benefits pool.

Facilities, Planning and Management
- UW-Madison Physical Plant provides support services to Brittingham House (maintenance of buildings and grounds, snow removal, trash pick up, etc.).
- FP&M departments share information with UW System and other campuses on specific initiatives e.g. We Conserve, energy conservation, recycling, utility cost projections, etc.
- UW-Madison Environment, Health and Safety provides services when requested to assist with worker's compensation cases (e.g. air sampling).

UW-Madison Police Department
- UW-Madison provides the full range of police service to UW System administration, including police officer response, threat assessment, crime investigation, and patrol of buildings, adjacent parking lots and streets.
- UW-Madison partners with all of the police chiefs from the system and manage a listserve that is widely used by the group. The Chiefs all participate in a monthly conference call hosted by UW-Madison.
- UW-Madison's Planning and Development division provides several significant services to UW System, including those with the most formal of agreements or contracts. This work is done with all of the 4-year and 2-year institutions. We also assist UW Extension in these areas.
- UW-Madison provides resources for continued layers of detailed planning for universities that proceed beyond basic plans for administrative units, and develop programs to keep COOP (Continuity of Operations) plans updated and tested.
- UW-Madison assists all UW System Universities, Colleges/Extension, and UW System administration with University Response Plans.
- UW-Madison assists Universities, Colleges/Extension, and UW System to assure that working processes from the 2009 Pandemic are maintained.
- The Legislative Audit Bureau conducts regular inquiries regarding the Plans listed above. We field calls from them directly and act as a resource when they make requests directly to System offices.
- UW-Madison provides templates and maintains a library of best practices for Response Plans, COOP, Pandemic, Pandemic COOP and Occupant Emergency Plans.
- UW-Madison provides technical assistance to the UW System schools that are looking at their overall emergency notification structure.
- Police officers from UW campuses are invited to assist UW-Madison Police by providing staffing for all UW football games. Campus officers collectively amount to about 15% of our staffing.

Information Technology
- UW-Madison's Division of Information Technology develops and supports a range of applications, interfaces and reports for all UW System campuses including PeopleSoft's Student Administration System, the personnel and payroll systems, and Shared Financial System.

Academic/Student Services:

Library Services
- UW-Madison Libraries staff provides leadership in acquiring and licensing shared electronic resources across the UW System.
- UW Madison Libraries and staff provide technical support and maintenance for applications used System-wide.
- UW-Madison Libraries developed and maintain the University of Wisconsin Digital Collections – a System-wide resource.

Dean of Students
- Madison is used as a model for many campuses with regard to segregated fee issues and structures. UW-Madison is actively involved in trainings and meetings of student governments across the state.
- UW-Madison Division of Student Life staff have been asked to evaluate threatening situations at other UW campuses.

Other Academic Collaborations (without the formal involvement of UW System administration)
- All of the University of Wisconsin Colleges two-year campuses and several four-year campuses participate in the UW-Madison Connections Program, which enables participating students to begin their college career at a partner institution while holding UW-Madison student status.
- UW-Madison participates in the UW Colleges Guaranteed Transfer Program.
- UW-Madison and UW-Milwaukee collaborate on the Intercampus Research Grants initiative to foster research projects and scholarship undertaken jointly by researchers at the two institutions.
- UW-Madison's Wisconsin School of Business collaborates with UW-Milwaukee on Chancellor's Degree for Executive MBA for Kohls.
- The UW Survey Center is hired by faculty and staff across the UW System and UW Extension as well as by policy planners and researchers in state government and non-governmental agencies to collect social science data.
- The Wisconsin Genomics Initiative is a partnership involving UW-Madison, the Marshfield Clinic, the Medical College of Wisconsin and UW-Milwaukee.
- UW-Madison's School of Medicine and Public Health has a partnership among UW-Milwaukee and Aurora Health Care in the Center for Urban Public Health.
- UW-Madison's Rural and Urban Scholars in Community Health program is a medical student pipeline program set up with UW-Milwaukee and UW-Platteville.
- The UW Native American Health Working Group convenes a monthly working group of researchers, faculty, program managers and students working on projects related to American Indian health. UW System partners include UW-Milwaukee and UW-Stevens Point.
- UW-Madison's Nelson Institute for Environmental Studies established and maintains a significant opportunity for collaboration among UW System faculty through the Wisconsin Initiative on Climate Change Impacts.
- The UW-Madison School of Nursing led the development of the successful statewide BSN@Home program, a collaborative venture involving nursing programs at Madison, Eau Claire, Green Bay, Milwaukee and Oshkosh.
- Many UW-Madison faculty and staff have established academic and research collaborations with other UW System institutions.